

TOPIC 4: EMPLOYEE IDENTIFICATION NUMBER AND EMPLOYEE NAME CHANGE

At some point, it will become necessary to edit or change basic employee information. This topic will describe how to change the employee's ID and name. The transactions associated with these tasks are the Employee ID Change (EIDC) and the Employee Name Change (ENCH).

At the end of this topic, you will be able to:

- Describe the role of the EIDC and ENCH screens in the employee maintenance process
- Complete/change an EIDC and an ENCH and
- Approve (if applicable) an EIDC



EMPLOYEE IDENTIFICATION CHANGE (EIDC)

A screenshot of a software window titled "Employee ID Change". The window has a blue title bar with standard Windows controls. Inside, there are three input fields: a large text box for "Name", and two smaller numeric input boxes for "Current Employee ID" and "New Employee ID".

Name	<input type="text"/>
Current Employee ID	<input type="text"/>
New Employee ID	<input type="text"/>



NOTES



EMPLOYEE IDENTIFICATION CHANGE (EIDC)

The Employment Status Maintenance (ESMT) transaction, which records basic personnel and pay information on a new employee, must be completed, approved and accepted by the system before the Employee ID can be changed.

The Employee ID is established initially on the ESMT. This suffices until an employee ID change becomes necessary. The transaction required to change the employee ID is the Employee ID Change (EIDC) window. This window has only two fields that must be completed. It is one of the most straightforward window in the SAM II HR/Payroll System. If you do not know the existing employee ID, you can look it up on the Employee Roster by Employee Name (QXRF) window.

SCENARIO

Jenny Sue Grant's employee ID was previously entered in the system by mistake. It is necessary that this be corrected. As a result, we will need to complete and process the Employee ID Change (EIDC) window.

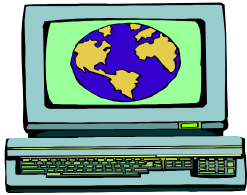
Step 1 To open EIDC from the SAM II Desktop Navigator window, click on the Go To icon. Type EIDC in the "CODE". Click on the Open button.

Step 2 Populate the following fields on the EIDC.

NAME – Inferred. The employee's full name (last name, first name, and middle initial) is displayed.

CURRENT EMPLOYEE ID – Required. Enter the employee's existing social security number. **SEE STUDENT CARD.**

NEW EMPLOYEE ID – Required. Enter the employee's new or changed social security number. **SEE STUDENT CARD.**



PROCESS AND UPDATE EMPLOYEE ID CHANGE (EIDC)

Employee ID Change

Name	GRANT, JENNY S
Current Employee ID	040 - 31 - 0001
New Employee ID	040 - 71 - 0001

1 of 6: APPROVAL 1 APPLIED Messages Tran ID:000425000015 4:21 PM 04/25/00



NOTES



PROCESS AND UPDATE EMPLOYEE ID CHANGE (EIDC)

You have completed entering the field information for the EIDC and it is time to update and approve the transaction. Remember that the Process: Update step checks the transactions for errors. After a transaction is free of errors, the necessary levels of approvals are applied. The EIDC requires Office of Administration, Division of Accounting approvals for all agencies. Your ability to apply approvals is determined by the security profile that you have been assigned. Also, remember that items will enter and leave your worklist based upon what stage of the editing and approval process the transaction is in, what your security profile allows you to do, and your agency workflow rules.

Now, let's complete the approval processing of the EIDC.

Step 1 Select **Process: Update**.

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2 Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the “real world”, you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile. At this point you have changed the employee's ID number.

Applying Additional but Not Final Approvals

Step 3 Select **Process: Approve**.

Step 4 Close the transaction. Workflow will now route the transaction as needed.

OR

Applying Final Approval

Step 3 Select **Process: Approve-Update**.

Step 4 Close the transaction.



EMPLOYEE NAME CHANGE (ENCH)

Employee Name Change

Current Name

Employee ID

Effective Date

Expiration Date

Name Change Reason

New Name

Prefix

First

Middle

Last

Suffix



NOTES



EMPLOYEE NAME CHANGE (ENCH)

The employee name is established on the Employment Status Maintenance (ESMT) window. At some point, an employee's name may need to be changed on the SAM II HR/Payroll System. The next change we will make is an employee name change, using the Employee Name Change (ENCH) window. In the system you are provided with windows that allow you to make changes to an employee's name and other identification data. When the data is changed in the applicable window, it is automatically updated in other places where it appears. If you do not know the existing employee ID, you can look it up on the Employee Roster by Employee Name (QXRF) window.

SCENARIO

Jenny is getting married today to Josh Jacobsen! Her name will become Jenny Sue Jacobsen. We have the opportunity to now complete another transaction – the Employee Name Change (ENCH).

Step 1 To open ENCH from the SAM II Desktop Navigator window, click on the Go To icon. Type ENCH in the “CODE”. Click on the Open button.

Step 2 Populate the following fields on the ENCH.

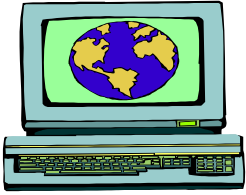
CURRENT NAME - Inferred. The employee's old full name (last name, first name, and middle initial) is displayed.

EMPLOYEE ID – Required. Enter the employee's social security number. **SEE STUDENT CARD.**

EFFECTIVE DATE – Required. Enter the date that the new name becomes effective. You cannot immediately update the database by entering a future date for a name change. However, if you wish to do so, you can enter a future date and suspend it (update it to the suspense file) for processing at a later date. The other option is to wait until a later date to process this transaction. Type **TODAY'S DATE.**

EXPIRATION DATE – Inferred. Displays the last date the existing name is in effect.

NAME CHANGE REASON – Optional. Leave blank, or enter the name change reason code. Valid values are located on the Name Change Reason (NMCR) window. Type **MRGE.**



EMPLOYEE NAME CHANGE (ENCH)

Employee Name Change

Current Name

Employee ID

Effective Date

Expiration Date

Name Change Reason

New Name

Prefix

First

Middle

Last

Suffix



NOTES



EMPLOYEE NAME CHANGE (ENCH)

Step 2 Continue to populate the following fields on the ENCH.

New Name

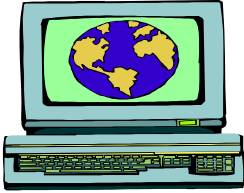
PREFIX – Optional. Leave blank, or enter the employee's new name prefix. Valid values are located on the Name Prefix (PREX) window. Type MRS.

FIRST – Required. Enter the employee's new first name. Type JENNY.

MIDDLE – Optional. Leave blank, or enter the employee's new middle name or initial. Type SUE.

LAST– Required. Enter employee's new last name. Type JACOBSEN.

SUFFIX – Optional. Leave blank, or enter the employee's new name suffix. Valid values are located on the Name Suffix (SUFY) window.



PROCESS AND UPDATE EMPLOYEE NAME CHANGE (ENCH)

Employee Name Change

Current Name: GRANT, JENNY S

Employee ID: 040 - 31 - 0001

Effective Date: 04 / 25 / 00

Expiration Date: 99 / 99 / 99

Name Change Reason:

New Name

Prefix: MRS

First: JENNY

Middle: SUE

Last: JACOBSEN

Suffix:

UPDATE WAS SUCCESSFUL Messages Tran ID: 156161500, 4865 4:31 PM 04/25/00



NOTES



PROCESS AND UPDATE EMPLOYEE NAME CHANGE (ENCH)

You have completed entering the field information for the ENCH and it is time to update the transaction. Remember that the Process: Update step checks the transactions for errors.

Now, let's complete the approval processing of the ENCH.

Step 1 Select Process: Update.

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful.



NOTES



ACTIVITY

1. To change an employee's ID, what window would you use to look up the existing employee ID?
2. The employee's name is established on the Employee Status Maintenance Window however, it is spelled incorrectly. The change will need to be made on the _____ window?



EXERCISE

Now that you are familiar with the EIDC and ENCH transactions, we'll let you make those changes to Carla J. Benson's records, using the information below.

EIDC

Using the employee we've established, Carla Benson, imagine that an entry error was discovered in her Employee ID. It is imperative that this be corrected. The current and new Employee ID numbers will be provided to you by the instructor for this exercise.

ENCH

Carla is getting married today to Sam Jackson! She will then become Carla Jackson.